

Iowa CASA Advocate Pre-Service Training

Iowa Child Advocacy Board

Module 6
Putting It All Together

In-Person



FACILITATOR NOTES**Module 6: Introduction**

Equipment/Supplies

- Laptop, projector and screen
- PowerPoint Slides for Module 6
- Slide: *Learning Outcomes*

What you should know

- The “Introduction” section takes 10 minutes.
- This final session is very interactive to ensure Advocates feel prepared to write a report, appear in court, and continue monitoring a case. It is important for them to also understand our agency’s policies and procedures within the scope of their role.
- ICO Handout is optional for those that wish to provide that handout to the volunteer and demonstrate how to use ICO. This is not required to be done in Module 6.

What to say/do

- Welcome everyone to the last session of their formal pre-service training and thank them for their continued participation. If needed, ask participants to introduce themselves. You can use an ice breaker such as, “Please tell what part of the pre-service training has meant the most to you thus far, and why.”
- **CUE SLIDE:** *Learning Outcomes*
- Share the learning outcomes for the session and the agenda. Recap what we’ve done thus far in training:
 - We’ve gathered/read additional case information and outlined our strengths and concerns related to the children, the parents, and the family functioning. We know there is a permanency hearing coming up next in the case, and this is where we would need to outline our recommendations, in particular, making recommendations regarding the permanency goal for each of the three children.
 - Explain that the purpose of today’s session is to consider various factors while contemplating what is in the children’s best interests for permanency and their long term well-being, while learning more about the characteristics of an effective court report, learning more about how to appear in court, and list the steps in monitoring a case.
 - Ask if there are any questions about what you plan to accomplish in this session.

Learning Outcomes:

- Identify the characteristics of an effective court report.
- Demonstrate how to appear in court.
- List the steps for monitoring a case.

Agenda

1. Welcome, Introduction, Learning Outcomes and Ground Rules
2. Court Report
3. Appearing in Court
4. Monitoring a Case
5. Local Resources
6. Policy & Procedures Manual / Letter of Acknowledgement
7. Advocate Support
8. Summary, Evaluation and Final Instructions



FACILITATOR NOTES**Module 6: Introduction**

What to say/do

- Explain that this session expands upon the fundamental knowledge and skills practiced throughout the pre-service training. By working through the case study in previous sessions, participants looked at a number of issues that affect children and families. Participants have also worked through many of the steps that an Advocate takes when assigned a case.
- Today, we're going to put all of these steps together and write an outline of a report for the Myers children using their completed Advocate Case Action Plan.

Introduction

This pre-service training continues to provide you the opportunity to acquire the skills, knowledge, and attitudes needed to be an effective CASA Advocate for children.

The purpose of today's session is to expand upon the skills practiced during your two-day training. From the notes you have acquired on your Advocate Case Action Plan and from the Myers Case Study, we will outline the court report. Because our reports are written prior to court hearings, we will then discuss and practice the basics of court appearances. Additional skill practice will be provided on the continued monitoring of a case.

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Slide: *Elements of an Effective Court Report*
-

What you need to know

- The “Court Report” section takes 135 minutes.
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What to say/do

- State that before we begin outlining a report, we need to review some of the elements of an effective CASA report.
- **CUE SLIDE:** *Elements of an Effective Court Report*
- Highlight how the court report is the Advocate’s primary and most influential tool in effectively communicating the child’s perspective and best interest and needs to remain objective.
- The report is the culmination of all the hours an Advocate spends on interviews, observations, document review, and information gathering. Emphasize how an effective report reflects these efforts.
- However, completing the court report does not have to be a difficult task because you have maintained detailed notes (i.e. in your Case Action Plan).
- Reaffirm the “3 C’s” in that the report needs to be clear (understandable), concise (succinct and to the point), and complete (comprehensive).
- State that the assessment section should focus on the child and include first-hand, factual information that is specific and descriptive. Any Strengths or Concerns are based on the reported factual information. Recommendations should address the Concerns.
- Recommendations will also address custody, placement, services and concurrent planning.

Elements of an Effective Court Report

The CASA court report is one of the most essential aspects of your work as an Advocate. The court report is the Advocate's primary tool in effectively communicating the child's perspective and best interest. Using a standard report format also ensures professionalism, consistency and objectivity.

Keys to a Successful Report

- The 3 C's: Clear, Concise, Complete
- Child focused
- Current, first-hand, factual information
- Concerns based on Information
- Recommendations based on Concerns

Court reports provide visible documentation of an Advocate's involvement. Court reports that provide visible documentation of an Advocate's involvement and that are presented in a consistent format increase a CASA Advocate's ability to effectively advocate for the child.

The facts stated throughout the report are the foundation of the CASA Advocate's recommendations. The facts stated throughout the report should be specific and descriptive. A report written from an honest and objective view can eliminate defensive attitudes and ease implementation of the volunteer's recommendations.

Judges rely on the information in CASA court reports as they make their decisions. You will submit reports before court hearings. Your recommendations will not only address concerns, but also address custody, placement, services and concurrent planning. The CASA court report provides a way to systematically organize pertinent information and give the court a clear mental image of the child's situation.

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Slide: *Report Writing*
 - Slide: *Report Writing Activity Part 1*
 - Slide: *Report Writing Activity Part 2*
 - Slide: *Report Writing Activity Part 3*
 - Module 6 Handout 6.1: *CASA Blank Template*
 - Handout #1: *Advocate Case Action Plan* (used in Modules 2, 4, 5)
 - Myers Case Study
-

What to say/do

- **CUE SLIDE:** *Report Writing*
- State that to avoid situations such as this cartoon and to ensure understanding and consistency, we are going to work through each section of a CASA Report.
- HANDOUT # 6.1 the *CASA Blank Template*.
- State that to familiarize everyone with the CASA Report we will explain each section, and then work through it, using their Case Action Plan and the Myers Case Study.
- For reference, participants can find a brief explanation of each report section on page 4 in their manual.
- Before beginning to write a report, consider the family strengths and needs and use that information to launch the assessment section of your report. This assists you in being objective and demonstrating that you are not writing a biased report.
- **CUE SLIDE:** *Report Writing Activity*
- **ACTIVITY:**
- Looking at page one of the Blank Template, ask where could you find these headings (or introductory pieces of information) such as the hearing type, children's case numbers, reporting period, and contacts?
 - Ensure responses are from the Dispositional Review Order (dated 04/20/07), CASA Report (dated 04/13/07), and Monthly Advocate Updates.
 - Direct participants to take 10 minutes to work individually or in small groups on completing page one.
 - When completed, ask participants to share several responses to ensure they have located the correct information. For example:
 - This report is for a Permanency Hearing on 06/25/07.
 - It covers the time from 04/13/07.
 - There were 2 face-to-face contacts and 7 phone/email contacts with Aubrey.
- Now turning to the top of page two, we list the current placement for each child. Take 2 minutes to document each child's current placement.
 - When completed, ask participants to share their responses.
 - Ensure that Shiloh is in family foster care, while Aubrey and Jackson are in separate residential treatment facilities.
- Now we have made it to the major section of the report. This is where we summarize the information obtained from interviews, visits, and case file documentation. This section is divided according to party, and individually lists the children first, then the parents, then the other parties. (**Activity** continued on F5)

CASA Report Fundamentals

Heading	<ul style="list-style-type: none">▪ Hearing type (Dispositional, Review, Permanency, Termination of Parental Rights)▪ Hearing Date and Time▪ Name of Coordinator, Coach, Advocate▪ Child(ren)'s Name, JVJV#, Date of Birth, Age▪ Date of Report
Reporting Period	<ul style="list-style-type: none">▪ Date from CASA appointment for 1st report or from date of last CASA report▪ Chart contacts made or attempted during the reporting period
Current Placement	<ul style="list-style-type: none">▪ List the current placement for each child
Assessment	<ul style="list-style-type: none">▪ Summary of contacts and current status of the parties:<ul style="list-style-type: none">✓ Each Child✓ Mother✓ Father✓ Other Parties (DHS, Attorneys, Providers, Therapists, Foster Family, Teachers, etc.)
Strengths	<ul style="list-style-type: none">▪ List current strengths of the child(ren) and family
Concerns	<ul style="list-style-type: none">▪ List current concerns for the child(ren) and family based on the facts presented
Recommendations	<ul style="list-style-type: none">▪ List recommendations related to concerns▪ Regarding:<ul style="list-style-type: none">✓ Court involvement✓ Placement✓ Visitation✓ Services✓ Parental compliance✓ Other significant issues

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Handout 2 *CASA Monthly Updates and letter*
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What to say/do**Activity** (continued):

- This section of the report is a factual summary of the current status of each party and the contacts you have made with them. It provides the basis for any strengths, concerns, and recommendations.
- To ensure you've considered the possible issues to report on, refer to page 5 in your manual, "Helpful Hints on Report Writing Assessments". You may also want to utilize Module 5's "Sample Line of Questioning" Handout #5 for an exhaustive list.
- On your Template, this Information section runs from page 2 through page 4.
- **CUE SLIDE:** *Report Writing Activity Part 2*
- Pass out Handout 5 *CASA Monthly Update* and ask them to read it. Now, Using the Monthly Advocate Updates and any notes you've accumulated on your Case Action Plan, work in your small groups to outline the key observations for each of the parties, starting with Shiloh. (You've already practiced writing Jackson's in Module 4, so his is included as an example.)
- After considering what you would outline for each of the children and Amanda (the mother), consider what you would write for the two putative fathers.
- Finally, considering the multiple contacts the Advocate had with other parties, decide which contacts and information you would also include in the report. List the individuals and outline important details about the information gathered.
- Please take the next 30 minutes to complete through page 4 on your Template.
 - After regrouping, ask participants what kind of information they outlined for Amanda. Ensure responses include:
 - Working full-time at Bybo Call Center since May
 - Attending individual counseling at Wabashaw since April
 - Attends regular, weekly visits with Shiloh
 - Participating in bi-weekly phone conferences with centers
 - Ask what other parties' contact they outlined? Could include:
 - Crissy Jacobs (DHS), Cindy Malcolm (FSRP), Chris Lite (Aubrey's therapist), Kim James (Jackson's therapist), Lori O. (family therapist), Emma Jones (foster mother), etc.
- Now, the last three sections are all based on the information they just summarized. Remember that these must be based on the facts they have presented.
- **CUE SLIDE:** *Report Writing Activity Part 3*
- Using the strengths and concerns you listed on pages 8-9 of the Advocate Case Action Plan as a starting point, take the next 15 minutes to outline all strengths and concerns you can think of for the children and family on page 5 of the Template.
 - After regrouping, ask each group or individual participant to list one strength and one concern.
 - Strengths may include: Amanda's employment and involvement with individual therapy, Shiloh's academic improvement, etc.
 - Concerns may include: Lack of sibling contact, Amanda's irritability, Amanda's criminal charge, etc. (**Activity** continued on F7)

Helpful Hints on Report Writing Assessments

Consider the following issues:

For Children

- Current Placement: description of any changes (type of placement and reason for change)
- Education: including pre-school or Early Head Start
 - What grade and school do they attend?
 - Do they have an IEP or other services at school?
 - How is the child doing academically and socially?
 - How is the child's attendance?
- Mental Health:
 - Does the child have any behavioral issues?
 - Is the child receiving therapy? If so, how often, with whom, and what type?
- Medical/Dental:
 - Date of last appointment, current health status, and developmental issues
 - Any issues identified by doctors/dentists that may need to be addressed?
 - What services are being provided to deal with any issues?
- Additional Services:
 - Transition to adulthood issues, independent living skills
- Visitation: with parents, siblings, or other connections
 - How often does the child see them and in what circumstances (length of visit, location, supervised or unsupervised)?
 - What are the child's interactions like during visitation?
- Child Personal Statements:
 - Has the child expressed any wishes or concerns?

For Parents

- Current status: residence, employment
- Participation in services: type of service, who provides, attendance, progress
- Contact with the children
- Progress or lack of compliance with case plan goals and court ordered requirements
- Overall observations of appearance, demeanor, behavior

For Other Parties:

Include statements from others involved with the family, including:

- Caretakers (relatives, foster parents, etc.)
- Service providers
- Therapists
- Teachers and daycare providers

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Slide: *Myers Case Timeline*
 - Slide: *Permanency*
 - Slide: *Recommendations*
-

What to say/do**Activity** (continued):

- Only one step now remains which is making recommendations based on the outlined concerns. Recommendations must also take into consideration the type of hearing. Ask what type of court hearing is coming up in the Myers case?
- **CUE SLIDE:** *Myers Case Timeline*
- As we discussed the legal timeline in previous modules, the Adoption of Safe Families Act (ASFA) of 1997 requires permanency hearings to be held no later than 12 months after a child enters foster care. Since the Myers children entered foster care on June 28, 2006, this next court proceeding is a permanency hearing.
- We have multiple tools to help us think about permanency and making recommendations. Refer to Permanency Questions Module 5 Handout #6 & Permanency Questions in participant materials.
- First, let's remember how important permanency is to our youth.
- **CUE SLIDE:** *Permanency* (View video – 6.07 minutes)
- Quickly debrief by asking what participants thought of the video. Did anything stand out? (Could bring up how it felt to hear the youth answer the question, "Do you have permanency?") Remind participants of key concepts from Module 5 on permanency for youth.
- **CUE SLIDE:** *Recommendations*
- As Advocates write recommendations, they need to remember the possible permanency goals. To help work through permanency recommendations, look at the permanency worksheet on page 6 in your manual.
- Also, refer back to the CASA Report Fundamentals on page 4, which highlights what recommendations should address:
 - Court involvement
 - Placement
 - Visitation
 - Services
 - Parental compliance
 - Other significant issues
- Please take the next 10 minutes to make recommendations for the upcoming permanency hearing. Refer to any notes completed on **Case Action Plan Handout #1** under Recommendations.
- After regrouping, ask each group or individual to share a recommendation until a thorough list has been shared. Can elect to write these on poster board if large group.
 - Ensure court involvement is discussed. Did all agree on a 6-month extension – for all three children?

Permanency Worksheet

1. Is it likely for the children to be returned home immediately or within the next six months?
If not, why is it not in the child's best interest to return home?
2. Should legal guardianship with a relative or some other suitable person be established?
If so, what rights and responsibilities should remain with the parents?
3. Should adoption be pursued? If so, are there any barriers to the children's adoption?
4. Should the children remain in the current placement or be placed in another living arrangement? Why?
5. If there has already been one or more permanency planning hearings, has DHS made reasonable efforts since the last hearing to implement the permanent plan for the children?
6. Is there any other information the court should have in order to make this decision?
7. Have the children been in placement outside the home for 15 of the most recent 22 months?
8. Is there any reason that the filing of a petition for termination of parental rights is not in the best interest of the children?

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Slide: *Report Editing*
 - Slide: *Active vs. Passive Voice*
-

What to say/do

- Congratulate Advocates on completing their first report template. If this was their actual case, their report draft would be sent to their Coach or Coordinator for editing. They will use the form “Editing the Court Report Checklist” starting on page 6 of your manual. The checklist covers both the overall composition and technical side of writing.
- **CUE SLIDE:** *Report Editing*
- We have a separate Report Writing In-Service training that we will provide to you prior to you writing your first court report. This will be a hands-on training that provides you will specific support during your first report writing experience.
- **Briefly** Highlight the following, ensuring:
 - All sections of the report are completed, and the body of the report is in narrative form.
 - Assessment section contains only facts and observations.
 - Strengths and Concerns sections contain statements based on the observations in the body of the report.
 - Recommendation section contains statements based on the facts of the Assessment and address the Concerns section.
 - Facts are presented objectively, and sources of information are identified.
 - For acronyms, write out the words the first time then use just the acronym throughout the report.
 - Consistency throughout the report on names and titles used for all parties.
 - Use spell check and proofread for common errors.
- Bring to Advocate’s attention the idea of active vs. passive voice in report writing by asking, “Does anyone know what that means?”
- At the heart of every good sentence is a strong, precise verb. In a sentence written in the active voice, the subject of the sentence performs the action. In a sentence written in the *passive voice*, the subject receives the action.
- To ensure clarity and flow in your writing, use the active voice whenever possible. Here’s an example...
- **CUE SLIDE:** *Active vs. Passive Voice*
- In this example, the active voice makes Aubrey the center of the action. Whereas, the song is the focus in the passive voice.

Editing the Court Report Checklist



Composition of Report

- ___1. The advocate included comments in all prescribed sections of the report template provided. (Questions in their report template are a guide; advocates do not need to answer each one.)
- ___2. The report is in narrative form, no bullet points.
- ___3. The Assessment section contains only facts and observations about each person in the case since last report.
- ___4. The Strengths comments pertain to child, parents, and other parties.
- ___5. The Concerns section contains statements based on the facts/observations in the body of the report.
- ___6. The Recommendation section contains statements based on the facts of the Assessment Section and Concerns.
- ___7. The Persons Contacted section contains a list of persons of interest interviewed since the last report.
- ___8. The CASA is consistent in the use of “I” or “this CASA” throughout the report.
- ___9. Sentences are complete.
- ___10. Sources of information are identified.
- ___11. Facts are presented objectively and factually. Judgmental statements are absent.
- ___12. Information is well organized
- ___13. The report is child centered.

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Handout #3: *CASA Report to the Court*
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What you need to know

- The notes here are not related to any participant pages.
 - The fac. guide is constructed so the checklist could be shared in its entirety.
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What to say/do**ACTIVITY:**

- Now that you completed your own outline of the CASA report, here is an example of what the final report might look like.
- **HANDOUT #3:** *CASA Report to the Court*.
- Give all participants 5 minutes to read over.
- Ask participants what they liked about the sample report?
- Ask if there were any noticeable differences between this report and their draft outline?
- Remind Advocates:
 - Their report should be concise, yet descriptive. It should 'paint a picture' for the reader.
 - Quotes can be useful, but should be used sparingly.
- The Advocate's draft report needs to be turned in to the Coach/Coordinator in advance, with time to review the draft prior to the hearing. Coaches/Coordinators will determine the draft's due date to provide time to prepare the final report.
- The draft report will be reviewed by the Coach/Coordinator who will provide clarification, suggestions and modifications before the final report is distributed to the Judge and legal parties.
- It is imperative that your report be submitted timely in order to be filed before the upcoming court hearing.

- ___14. After reading the report, the reader has a good mental picture of the situation, accurate information on the current status and the advocates concerns and recommendations.

Spelling, Grammar, Punctuation, Capitalization

- ___1. There are no misspelled words in the report because the advocate used “spell check” on the finished report.
- ___2. There’s subject-verb agreement, complete sentences, proper tense of verbs, appropriate punctuation and capitalization throughout the report.
- ___3. For each acronym, the advocate wrote out the words the first time the writer used the acronym and then used just the acronym throughout the report.
- ___4. The advocate used the “active” voice rather than the passive voice throughout the report.
- ___5. The advocate avoided use of quotation marks and contractions and didn’t leave anything dangling. If quotations are used, double check that they are accurate in word and citation.
- ___6. Sentences are reasonable and varied in length. Sentences are concise, using the fewest number of words needed to describe the action or occurrence. Information that is extraneous is removed.
- ___7. Contractions and abbreviations are avoided.
- ___8. There is consistency throughout the report on names and titles used for all parties. The spelling of names is double checked.
Capitalization of names and titles is double checked.
- ___9. Appropriate courtesy titles are used. (Ms., Mrs., Mr., Dr.)

FACILITATOR NOTES**Module 6: Court Report**

Equipment/Supplies

- Slide: *Appearing in Court*
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What you should know

- The “Appearing in Court” section takes 45 minutes.
 - If Advocates express concern or feelings of inadequacy after reading the case study sample report, remind them that this report was authored by the staff that created the case study. Advocates will also be that well-versed in their own case, so reporting on their first-hand knowledge will make report writing more natural.
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What to say/do

- Now that you’ve completed your report for court, what happens? We prepare to attend the court hearing. To ease some anxiety about court appearance, let’s start with a good example of what not to do.....
- **CUE SLIDE:** *Appearing in Court - Court Etiquette* (View video – 1.57 minutes)
https://www.youtube.com/watch?feature=player_detailpage&v=oEuljvGB-YU

- ___ 10. Common error locations are proofed: Near beginning or endings of lines; near the bottom of a page; in number combinations; in proper nouns; in long words.
- ___ 11 Common mistakes are proofed: Transposing letters within a sentence or within one word; Omission of one letter in a pair of doubled letters; Substituting one small word for another or doubling small words. (if, in, as, by, be)

FACILITATOR NOTES**Module 6: Appearing in Court**

Equipment/Supplies

- Slide: *Commandments for Witnesses*
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What to say/do

- As you plan to attend court, remember the basics:
 - Be on time
 - Bring a copy of your report
 - Be prepared
- Even if you did not receive a subpoena beforehand, you may be asked to testify in court that day. If your testimony is not requested, the judge may still more casually ask if you have anything to verbally add. You may prepare a short verbal statement or respectfully decline if nothing has changed since the writing of your report.
- If you are called to testify, remember the Ten Commandments for Witnesses (as found on page 10-11 in your manual).
- **CUE SLIDE:** *Commandments for Witnesses*
- Highlight that it is imperative that you:
 - Tell the truth – Telling the truth requires that a witness testify accurately about what he/she knows. CASA's reputation for truthfulness is a most important asset.
 - Do not guess – If you do not know the answer, then say you do not know.
 - Be sure you understand the question – You cannot possibly give a truthful or accurate answer unless you understand the question. If you don't understand the question, ask the attorney to repeat it. The court reporter will be asked to read back the question for you.
 - Take your time and answer only the question asked – Give the question such thought as it requires to understand it and formulate your answer, and then give your answer.
 - If you can answer a question with yes or no, then do so.
 - Respond only to the question asked. Do not elaborate unless asked to do so.
 - Never volunteer information on the stand.
 - If something you say is objected to by an attorney, stop answering until the judge decides if your remarks will be allowed.
 - If asked whether you have talked to any of the attorneys, or to any investigators, admit it freely if you have done so. If this occurred during the normal course of the case, there is no need to hide this information. You will not get into any trouble.
 - If you make a mistake in earlier testimony, correct it as soon as possible during later testimony.
- 2. Do not give an opinion unless requested – Say, "It is my assessment that..." and be prepared to back up your opinion with facts.

Appearing in Court

Remember the Basics:

- Be at court 15 minutes early.
- Bring a copy of your written report.
- Prepare beforehand.
- Have the facts in order.



Ten Commandments for Witnesses

1. **TELL THE TRUTH.** Testify accurately about your first-hand information.
2. **DO NOT GUESS.** Simply state you do not know the answer.
3. **BE SURE THAT YOU UNDERSTAND THE QUESTION.** You may ask the attorney to repeat the question if you did not understand.
4. **TAKE YOUR TIME AND ANSWER ONLY THE QUESTIONS ASKED.** Think and formulate your answer before speaking. Do not elaborate unless asked to do so.
 - a. If something is objected to by an Attorney, stop answering until the Judge decides if your remarks will be allowed.
 - i. If the objection is sustained, the question cannot be asked or answered.
 - ii. If the objection is overruled, the question continues and you may answer.
5. **DO NOT GIVE AN OPINION UNLESS IT IS REQUESTED OF YOU.** It is acceptable to say, "It is my assessment that..." Just be prepared to back up your assessment (opinion) with facts from your report and investigation.

FACILITATOR NOTES**Module 6: Appearing in Court**

What to say/do

Ten Commandments for Witnesses (continued):

- Beware of questions involving time and distance – If you make an estimate, make sure that everyone understands that you are estimating.
- Speak up with a firm voice & give an audible answer – Everything you say is being recorded. Do not nod your head or answer “uh huh”. Try to speak a little louder, slower, and more distinctly than you usually speak.
- Be courteous at all times – Proper etiquette gives respect to the court.
 - Answer “Yes or no”, “sir or ma’am” and address the Judge as “Your Honor”.
 - Avoid slang language, unless directly quoting.
 - If vulgarity needs to be used as part of a quote, advise the judge before starting the vulgarities.
 - Never lose your temper, even if an attorney questions you in an irritating manner, which may be their style. They may try to intimidate or push you into getting upset to discredit your statements. Remember, the attorney has a job to do, and they must represent their client. If you are asked rapid-fire questions, the County Attorney will generally come to your aid and will clarify anything you could not say earlier.
 - Treat the parents and the attorneys with respect. Do not use a snippy or disrespectful tone while testifying.
- Maintain a serious, professional demeanor and attitude. Court cases are serious business, especially for the family or the children in interest.
 - Dress for court as if you were going for a job interview. Look as professional as possible as impressions are important. It can enhance or diminish the weight the court gives the CASA report and recommendations.
 - Avoid joking and laughing. You can be friendly and courteous without being too lighthearted.
 - Maintain good eye contact with the person questioning you.
 - Keep good posture, carry yourself well, be attentive in your seat, be relaxed, and appear confident.
 - Do not chew gum or mints while on the witness stand. You may ask for water if your throat becomes dry.
 - Keep your hands from fidgeting so as to not be distracting. Keeping one hand in your lap may help.
- Always be prepared to testify.

6. BEWARE OF QUESTIONS INVOLVING TIME AND DISTANCE.

Clarify if you are estimating.

7. SPEAK UP WITH A FIRM VOICE AND GIVE AN AUDIBLE ANSWER. Remember everything you say is being recorded.**8. BE COURTEOUS AT ALL TIMES.** Using proper decorum gives respect to the court.**9. MAINTAIN A SERIOUS, PROFESSIONAL DEMEANOR AND ATTITUDE.** Court is a serious time, especially for the family and children.

- Dress professionally.
- Avoid joking and laughing.
- Maintain good eye contact with the person questioning you.
- Keep good posture, carry yourself well, be attentive in your seat, be relaxed, and appear confident.
- Do not chew gum or mints while on the witness stand. You may ask for water if your throat becomes dry.
- Keep your hands from fidgeting so as not to be distracting. Keeping one hand in your lap may help.

9. ALWAYS BE PREPARED TO TESTIFY.

FACILITATOR NOTES**Module 6: Appearing in Court**

What you should know

- The thought of being called to testify in court can become a source of anxiety for new Advocates. Remind them that they will be able to observe a court hearing before appearing in court for their first case. Additional training will be available, and both Coaches and Coordinators are here to support them.
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What to say/do

- Explain that for many Advocates, the thought of testifying in court can be rather intimidating at first. We want you to feel confident in all aspects of your advocacy role, including your appearance in court.
- To help Advocates experience some of the basic questioning that might occur, let's assume that you are Miki Getz, the Advocate for the Myers' children. You submitted your CASA Report to the Court and are now at the Permanency Hearing.
- State that at this point, most parties appear to be in agreement to a 6-month extension of the Reunification goal. You agree with that plan, but have still been asked to testify.
- Like in an actual court setting, inform Advocates that they may have their CASA Report with them on the witness stand if needed for reference. However, the report should be the only documentation they bring.

ACTIVITY:

- Instruct Advocates that you will ask questions similar to those that may be asked of Advocates in court. Ask Advocates to share how they might respond to the questions.
 - For each question, ensure a response similar to the given answer is provided.
1. Please raise your right hand. Do you swear or affirm that the testimony you are about to provide is the truth?
 - a. I do.
 2. Please state your name for the record and spell your last name.
 - a. Miki (M-i-k-i) Getz (G-e-t-z).
 3. What is your relationship to these children?
 - a. I am the Court Appointed Special Advocate for the children.
 4. How long have you been involved with this family?
 - a. October 12, 2006.

(Activity continued on F13)

Testifying in Court Questions



1. Please raise your right hand. Do you swear or affirm that the testimony you are about to provide is the truth?
2. Please state your name for the record and spell your last name.
3. What is your relationship to these children?
4. How long have you been involved with this family?
5. What are your responsibilities as a CASA Advocate?
6. What are the requirements to be a CASA Advocate?
7. What training did you receive to be a CASA Advocate?
8. Have you prepared for today's hearing?
9. Have you made recommendations to the court as part of your report?
10. What are your recommendations?
11. What is the basis for your recommendations?
12. When is the last time you observed the mother and children?
13. Have you received training in regard to permanency?

FACILITATOR NOTES**Module 6: Appearing in Court**

What to say/do**Activity** (continued):

5. What are your responsibilities as a CASA?
 - a. To do an independent assessment of the case, make reports to the court, and monitor the case. I make recommendations to the court regarding the best interest of the children.
6. What are the requirements to be a CASA?
 - a. A belief in a child's right to a safe and nurturing environment. Willingness to devote the time necessary to assess and monitor the case. Ability to be objective.
7. What training did you receive to be a CASA?
 - a. Thirty (30) hours of pre-service training to learn about the child welfare system, the dynamics of abuse and neglect, and the CASA's role. National CASA standards also require twelve (12) hours of continued training annually. We are provided with in-service trainings and various options for independent study.
8. Have you prepared for today's hearing?
 - a. Yes.
9. Have you made recommendations to the court as part of your report?
 - a. Yes.
10. What are your recommendations?
 - a. In the best interest of these children, I made the following recommendations:
 - i. That the temporary care, custody and control of the children remain with the IDHS for continued family foster care placement for Shiloh and continued residential treatment placements for Jackson and Aubrey.
 - ii. That a six-month extension to the reunification goal be granted as Jackson and Aubrey remain in treatment programs at this time and more time is needed to work on reunification of all the children with their mother, Amanda Myers.
 - iii. That interactions between Amanda and Shiloh be increased at the discretion of the IDHS, CASA, and GAL/children's attorney.
 - iv. That interaction for Shiloh and her siblings be provided at their treatment centers.

(Activity continued on F14)

Testifying in Court Answers

1. I do.
2. Miki (M-i-k-i) Getz (G-e-t-z).
3. I am the Court Appointed Special Advocate for the children.
4. October 12, 2006.
5. To do an independent assessment of the case, make reports to the court, and monitor the case. I make recommendations to the court regarding the best interest of the children.
6. A belief in a child's right to a safe and nurturing environment. Willingness to devote the time necessary to assess and monitor the case. Ability to be objective.
7. Thirty (30) hours of pre-service training to learn about the child welfare system, the dynamics of abuse and neglect, and the CASA advocate's role. National CASA standards also require twelve (12) hours of continued training annually. We are provided with in-service trainings and various options for independent study.
8. Yes.
9. Yes.
10. In the best interest of these children, I made the following recommendations:
 - a. That the temporary care, custody and control of the children remain with the IDHS for continued family foster care placement for Shiloh and continued residential treatment placements for Jackson and Aubrey.

FACILITATOR NOTES**Module 6: Appearing in Court**

What to say/do**Activity** (continued):

- i. That Amanda maintains employment; consistently participates in 1:1 or group therapy; continues to participate in Aubrey and Jackson's treatment program through telephone sessions every two weeks; refrains from criminal activity; and participates in a consumer credit counseling program for budgeting and finances through the Help Center.
 - ii. Finally, that DHS continue to explore relative placement options as part of concurrent planning.
 11. What is the basis for your recommendations?
 - b. Since appointed, I have visited the three children on a monthly basis. I have also maintained contact with the children's mother, caseworker, provider, therapists, and teachers. My recommendations are based on my observations and assessments of the professional's reports.
 12. When is the last time you observed the mother and children?
 - a. I last met with each of the children individually earlier this month. I most recently met with Amanda Myers on May 21, 2007, at her residence.
 13. Have you received training in regard to permanency?
 - a. Yes. It is unhealthy for children to remain in a state of limbo; it is important for children to find stability. However, it is also traumatic for children to be separated from their families. In Iowa, permanency should be addressed six months after removal for children 0-3 years of age, and twelve months after removal for children 4 years of age and older.
- Congratulate Advocates for working through this line of questioning. Encourage them by stating that there is an expected level of anxiety when called to testify. However, they will have the knowledge needed to answer these questions by being actively involved in their case.
 - Advise Advocates that additional, specific details regarding each county's court etiquette will be provided when Advocates observe juvenile court before being sworn in.

- b. That a six-month extension to the reunification goal be granted as Jackson and Aubrey remain in treatment programs at this time and more time is needed to work on reunification of all the children with their mother, Amanda Myers.
 - c. That interactions between Amanda and Shiloh be increased at the discretion of the IDHS, CASA, and GAL/children's attorney.
 - d. That interaction for Shiloh and her siblings be provided at their treatment centers.
 - e. That Amanda maintains employment; consistently participates in 1:1 or group therapy; continues to participate in Aubrey and Jackson's treatment program through telephone sessions every two weeks; refrains from criminal activity; and participates in a consumer credit counseling program for budgeting and finances through the Help Center.
 - f. Finally, that DHS continue to explore relative placement options as part of concurrent planning.
11. Since appointed, I have visited the three children on a monthly basis. I have also maintained contact with the children's mother, caseworker, provider, therapists, and teachers. My recommendations are based on my observations and assessments of the professional's reports.
12. I last met with each of the children individually earlier this month. I most recently met with Amanda Myers on May 21, 2007, at her residence.
13. Yes. It is unhealthy for children to remain in a state of limbo as it is important for children to find stability. However, it is also traumatic for children to be separated from their families. In Iowa, permanency should be addressed six months after removal for children 0-3 years of age, and twelve months after removal for children 4 years of age and older.

FACILITATOR NOTES**Module 6: Monitoring a Case**

Equipment/Supplies

- Slide: *Monitoring Responsibilities*
 - Slide: *Monitoring Activity*
 - Handout #4: *Permanency Order*
-

What you should know

- The “Monitoring a Case” section takes 45 minutes.
 - With much emphasis being placed on the beginning stages of an Advocate’s role, it is important to remember the role of monitoring is of extreme importance. The continued monitoring of a case encompasses the other key components of a CASA’s roles of: investigating, facilitating, and advocating on an ongoing basis.
-

What to say/do

- Ask that after all the work leading up to court, what do Advocates do now? We continue our role by monitoring the case.
- **CUE SLIDE:** *Monitoring Responsibilities*
- As Advocates, it is important that you remain actively involved in a case until it closes, with the child in a safe, permanent home. Advocates monitor their cases by regularly checking on how things are going.
- Monitoring responsibilities include:
 - Conducting follow-up investigations to ensure court orders are being properly executed. This is done by reviewing court orders, visiting the child monthly and maintaining contact with other parties regularly, communicating if court orders are not being followed, and preparing for future hearings.
 - Reporting to the parties when the needs of the child are not being met.
 - Protect and promote the best interest of the child by regularly monitoring the child to evaluate appropriateness of placement, determine if the child is receiving court-ordered services, and identify any unmet needs.
- By reviewing the latest court order and case plan goals, we plan how we will continue to monitor the case.

ACTIVITY:

- **HANDOUT #4:** the Myers’ case study ***Permanency Order***, asking Advocates to take 5 minutes to read the order to plan how they would continue monitoring this case.
- **CUE SLIDE:** Monitoring Activity
- **Step 1:** Ask Advocates what should they glean from this court order? Ensure responses encompass the following:
 - Next court hearing on November 27th
 - Permanency goal of reunification continued for 6 months
 - Aubrey’s concurrent plan – guardianship with grandma
- Concurrent planning was first mentioned in Module 2 of the training. What does that mean? (Ensure responses involve identifying and working toward a child’s primary permanent goal, while simultaneously identifying and working on a secondary goal in case efforts toward the primary goal prove unsuccessful.)

(activity continued on F 16)

Monitoring Responsibilities

Conduct follow-up investigations to ensure that court orders are being properly executed:

- a. Review the court orders.
- b. Visit the child monthly and maintain sufficient contact with parents, relatives, foster parents, and agency personnel to determine if court orders are being properly executed.
- c. Verify accuracy of information gained during follow-up investigation.
- d. Notify staff and the attorney for the child if the orders of the court are not being properly executed.
- e. Contact those who are responsible for carrying out court orders to address noncompliance.
- f. Prepare for each hearing by writing reports on case plan progress and compliance with court orders.

Report when the needs of the child are not being met:

- a. Identify facts and changes in situation that may necessitate the case's return to court.

Protect and promote the best interest of the child until formally relieved of the responsibility by the court:

- a. Regularly monitor the child in his/her home setting to evaluate appropriateness of placement, determine whether the child is receiving court-ordered services, and identify any unmet needs.
- b. Determine if additional services are needed for the child.
- c. Identify facts and changes in the situation that may necessitate the case's return to court.

FACILITATOR NOTES**Module 6: Monitoring a Case**

Equipment/Supplies

- Handout #5: *CPP Part B*
 - Handout #6: *CASA Advocate Responsibility Checklist*
-

What you should know

- The CPP intentionally comes after writing the report as we want to make sure it is clear that we do not rely on DHS reports for our own report; that ours needs to be on time regardless. We do not wait for anyone else's report to write/submit our report.
-

What to say/do

- As we get into another part of the Advocate's role, remind them that while it seems there is so much to remember, we will continue to provide ongoing training opportunities. Furthermore, Coaches and Coordinators are there to assist and answer any of their questions.
- Now that you have reviewed the latest court order, we need to further consider the case plan goals in determining how we plan to monitor the case.

ACTIVITY *continued*:

- **Step 2:** Handout the updated CPP Part B Handout 5, asking Advocates to take 5 minutes to read the update.
- From this document, what issues should you as an Advocate follow up on? Ensure that responses include:
 - Interstate Compact procedure for Aubrey's grandmother
 - Transportation
 - Shiloh's long-term transition plan home
- **Step 3:** Now, please take a look at the **Monitoring Activity on page 16** of your manual. This page shows 3 of the 5 goals from the Myers' original case plan. Considering information previously provided in the case file and from your initial Advocate Case Action Plan, what conditions (goal steps) still need addressed?
- **Step 4:** Please work in pairs (if available) and take the next 10 minutes to go through each goal, documenting which ones are completed, in progress, or still needed.
- When completed, come together to discuss their responses. Ensure that Advocates agree that more information is needed on:
 - School attendance – not addressed other than reports on current grades and behaviors.
 - Amanda's medication – report from therapist but no mention of medication
 - Amanda's probation – any effects from recent theft charge
- Recap by saying just as they made their initial Case Action Plans with questions to ask and action steps to take, they will continue to update these plans as the case progresses and they continue the monitoring role.
- A tool that can be used from the very beginning of a case and while monitoring is **HANDOUT #6: CASA Advocate Responsibilities Checklist**. Disperse Handout 6.

Monitoring Activity

Child Well-Being Goal:

Myers children will learn skills to help them cope with their mother's lack of parenting and high expectations. Jackson will learn coping skills to better manage his anger and physical aggression.

Steps: Who does what, where and when	Date Modified	Date Completed
1. Jackson will participate in individual therapy.	4/13/07	
2. Aubrey will participate in individual therapy.	4/13/07	
3. The family will participate in FSRP services.	4/13/07	
4. Kidz Connection will provide FSRP services.	4/13/07	
5. School attendance will improve for all children.	4/13/07	
6. Jackson will receive medication management.	4/13/07	

Parental Capabilities Goal:

For Amanda to learn more appropriate parenting and supervision skills and to not rely on alcohol and gambling as a way out of addressing her "problems".

Steps: Who does what, where and when	Date Modified	Date Completed
1. Amanda Myers will complete gambling/substance abuse education classes at Merle H Recovery Center.	10/13/06	
2. Amanda Myers will attend individual therapy at WLMH. She will take her prescribed medications on a consistent basis.	4/13/07	
3. Amanda Myers will attend anger management classes.	4/13/07	
4. Amanda Myers will cooperate with a psychosocial evaluation.	10/13/06	
5. Amanda Myers will cooperate with the terms of her probation. She will refrain from all criminal activity.	4/13/07	

Home Environment Goal: Amanda will learn to budget her money and provide for her children's basic needs including safe and stable housing.

Steps: Who does what, where and when	Date Modified	Date Completed
1. Amanda Myers will gain employment.	4/13/07	
2. Amanda Myers will maintain an appropriate home. She will not allow inappropriate family individuals around the children.	4/13/07	

FACILITATOR NOTES**Module 6: State Resources**

Equipment/Supplies

- Slide: *Resources*
-

What you should know

- The “Resources” section takes 10 minutes.
 - Advocates will be provided with specific contact information for local service providers as needed on their individual cases.
-

What to say/do

- Inform Advocates that as they perform the roles of an Advocate, they will become familiar with local service providers and resources. Every area has specialized resources available, but some statewide referral numbers and information have been included in your manual, starting on page 17.
- **CUE SLIDE:** *Resources*
- As an example, mention United Way’s 211 website allows users to search for services within a particular city or zip code.
 - It is important to remind participants that what they must know is that CASA is not the Do-er on the case, not the person to actually call the resources, but to understand that it is helpful to know what is available and can offer the suggestions to those that would be doing the actual referral.

Statewide Referral Numbers

(All numbers are available 24 hours a day/ 7days a week unless otherwise noted.)

Information: 211 or www.211.org (United Way Information & Referral)

Foundation 2 Crisis Line: 800-332-4224

Foundation 2 Crisis Center provides trained, compassionate telephone counselors to assist anyone in Iowa dealing with a crisis. A crisis can be about anything – suicide, divorce, serious illness, problems with friends or family, financial stresses, or substance abuse struggles. Or it could be a series of smaller problems that have compounded and become overwhelming.

Iowa's Child and Dependent Adult Abuse Hotline: 800-362-2178

Iowa COMPASS: 800-779-2001 or www.iowacompass.org

Iowa COMPASS is Iowa's information and referral service for people with disabilities, their families, service providers, and other members of the community. Iowa COMPASS maintains information on over 5,500 local, state, and national agencies and programs. Phone line is available 8 a.m. to 5 p.m. Monday through Friday.

Iowa Concern: 800-447-1985 or www.extension.iastate.edu/iowaconcern

Iowa Concern is a program of the Iowa State University Extension service. By calling Iowa Concern, you have access to an attorney for legal education, stress counselors, and Information and referral services for a wide variety of topics. The website features an extensive database for legal, finance, crisis and disaster, and personal health issues. The web site is also the link to Iowa Concern's Live Chat service.

Iowa Domestic Violence Hotline: 800-942-0333

When calling from anywhere in Iowa, the hotline puts domestic abuse survivors or others affected by domestic violence in immediate contact with a trained advocate who can: Provide crisis counseling; Provide information and education about domestic abuse issues; Refer callers to the domestic violence project in their area of the state.

FACILITATOR NOTES

Module 6: State Resources

What to say/do

Statewide Referral Numbers (continued):

- Mention Iowa Foster and Adoptive Parents Association provides resources and classes to Iowa's foster, adoptive, and kinship families.

Iowa Drug and Alcohol Help Line: 866-242-4111 orwww.drugfreeinfo.org

This is your first call in Iowa for substance abuse and gambling information, and referrals to treatment facilities and crisis counseling.

Iowa Foster and Adoptive Parents Association (IFAPA):800-277-8145 or www.ifapa.org

IFAPA provides resources, referrals, and peer support to foster, adoptive, and kinship families throughout Iowa 8 a.m. to 5 p.m. Monday through Friday.

Iowa KidsNet: 800-243-0756 or www.iakids.org

Iowa KidsNet responds to crisis calls from foster, adoptive, and kinship families 24/7.

Iowa Legal Aid: 800-532-1275 or www.iowalegalaid.org

Iowa Legal Aid provides free legal help with civil law problems for eligible low-income Iowans.

Iowa Protection and Advocacy Services: 800-779-2502 orwww.ipna.org

Iowa Protection and Advocacy Services is a program that will protect and advocate for the human and legal rights that ensure individuals with disabilities and/or mental illness a free, appropriate public education, employment opportunities and residence or treatment in the least restrictive environment or method and for freedom from stigma. IPAS will support people with disabilities to secure their rights and full participation as citizens through a program of self advocacy education, information and referral, non-legal advocacy, and legal and systems advocacy.

Iowa Respite and Crisis Care Coalition (IRCCC): 515-309-0858 orwww.irccc.com

IRCCC links families and respite providers, provides funding for respite, provides information on crisis respite programs throughout Iowa. The office is open during regular business times, but the website has extensive information on programs in the state.

Iowa Sexual Abuse Hotline: 800-284-7821

Trained advocates provide free, confidential counseling and support, as well as referrals to medical and legal advocacy.

FACILITATOR NOTES

Module 6: State Resources

What to say/do

Statewide Referral Numbers (continued)

Speech to Speech: 1-877-526-6690

Relay services for the hard of hearing, deaf, and those with speech disabilities.

Iowa Statewide Poison Control Center: 800-222-1222 or

www.iowapoison.org

TEEN Line: 800-443-8336 or www.extension.iastate.edu/teenline/

TEEN Line is not a crisis or hotline but is a free, confidential line that provides personal and health-related information and referrals on topics such as:

- Health
- Eating/Weight
- Relations with Parents or Friends
- Violence
- AIDS/HIV
- Alcohol or Drug Use
- Sexual Relationships
- Birth Control/Pregnancy
- Stress

The Youth Law Hotline: 800-728-1172

The Youth Law Center provides the Youth Law Hotline 8 am to 4:30 pm Monday through Friday. Anyone living in Iowa who is under the age of 18 can call the hotline to get free legal advice and information regarding issues affecting youth rights and responsibilities.

Professionals who work with youth can also call for legal advice about issues relating to youth. The most frequently asked questions pertain to the following areas:

- Emancipation
- Custody/Guardianship
- Abuse and Neglect
- Pregnancy/Reproductive Rights
- Runaway/Homeless
- School
- Delinquency
- School problems

FACILITATOR NOTES**Module 6: Policy & Procedures**

Equipment/Supplies

- Slide: *CASA Policy and Procedures*
- Handout 7: *Advocate P&P Manual*

What you should know

- Advocates will have a copy of the manual for future reference, but the purpose of this piece of the training is to ensure several specific policies are brought to their attention.
- While the majority of the children served meet the definition of a child in need of assistance (CINA), the court may appoint an Advocate in other proceedings. An Advocate may represent the interests of a child in any judicial proceeding to which the child is a party, or is called as a witness, or relating to any dispositional order involving the child resulting from the proceeding. The court may appoint an Advocate in a delinquency, child in need of assistance or family in need of assistance proceeding. If the court deems it beneficial to the child, the court may authorize the court appointed special advocate to continue a relationship with and provide advice to the child for a period of time beyond the child's 18th birthday.

What to say/do

- Inform Advocates that the policy and procedure manual provides overall guidance and direction for the work they will do as Advocates.
- **CUE SLIDE:** *CASA Policy and Procedures*
- Pass out Handout 7: *Advocate P&P Manual* to participants. We will highlight some of the material within the manual and ask that you sign the "Acknowledgement of Receipt".
- Review the highlights on page 26 of the participant manual.
 - Section 1 is the program overview – our mission, purpose, staff responsibilities, state and national affiliations. The CASA Program complies with all state law and regulations, as well as administrative and court rules. The program is further affiliated with National CASA, and is bound by their standards. Advocates should be made aware of the National CASA organization (www.casaforchildren.org).
 - Section 2 covers ethical conduct and the importance of confidentiality. This section outlines who will receive a copy of the reports Advocates submit to court – only legal parties will receive a copy.
 - Section 3 outlines professional conduct that Advocates will adhere to while fulfilling their roles as investigator, facilitator, monitor and advocate. Highlight the key issues of
 - no gift giving
 - not providing direct services
 - expectations if an Advocate chooses to transport a child
 - revisit the issue of confidentiality. Staff and Advocates are subject to standards of confidentiality pursuant to the Iowa Code, including sections 217.30, 228.6, subsection 1, sections 232.147, 235A.15, 237.21, 600.16, and 600.16A
 - point out the social media policy

CASA Program: Advocate Policy and Procedures

Each Advocate will receive a copy of the CASA Advocate Policies and Procedures manual. This manual contains the policies that govern the work you do as Advocates.



Program Overview	Section 1 provides an overview of the Iowa CASA Program to include the mission, purpose and governance of the program. State and National Affiliations are also outlined.
Ethical Conduct	Section 2 provides policies for conduct, confidentiality and the Advocate's knowledge and understanding of the system, dynamics of abuse and neglect and a child's inherent right to grow up with dignity in a safe environment that meets the child's best interest.
Professional Conduct	<p>Section 3 covers many elements Advocates need to be aware of:</p> <ol style="list-style-type: none">1. Advocates do not directly give money, gifts, or items to a CASA child or family.2. Advocates do not provide direct services.3. The Iowa CASA Program does not encourage transportation by Advocates. If an Advocate chooses to transport a child they must complete all the steps as outlined by the Transportation Policy to include successfully passing a background check, having insurance coverage that meets or exceeds the state minimum requirement, valid driver's license and written permission of the local Coordinator and the child's custodian, legal guardian or custodial agency.4. Advocates are strictly prohibited from commenting on any case to the media or legislators.5. Advocates must comply with the ICAB social media policy on page 17 of the manual.6. Conflict of interest, communication, confidentiality, duty to disclose and state liability policies are also outlined in this section.

FACILITATOR NOTES**Module 6: Policy & Procedures****Equipment/Supplies**

- Slide: *CASA Policy and Procedures* Handout 8: *Iowa Code for Oath*

What to say/do: CUE SLIDE (2nd): CASA Policy and Procedures

- After training is completed, Advocates will take an Oath of Confidentiality with the local judge and will be given a CASA identification badge and certificate.
- Section 4 outlines the policies that govern the Advocate's responsibilities:
 - Consult with Coach/Coordinator when accepting a case and developing an Action Plan for the case. Maintain regular communication.
 - Meet with the child at least once every 30 days.
 - Conduct ongoing review of relevant documents; interviews of any pertinent persons.
 - Write reports for each hearing with recommendations in the best interest of the child. Be present for court hearings.
 - Advocates are encouraged to use the ICO system for case record management, but a paper copy may be made available.
 - Electronic copies of confidential information must be stored in a password protected folder, and paper copies must be kept in a secured location.
- Section 5 covers CASA Management
 - Advocates are released from a case by:
 - Case closure – court jurisdiction terminated
 - Program request
 - Court termination – the Court reserves the right to terminate the appointment of an Advocate
 - Advocates may request a leave of absence from the program for up to 24 months as long as they continue to complete the minimum 12 hours of ongoing training per year.
 - If an Advocate needs to resign from the program, they must submit their resignation in writing to the Coordinator. They are then asked to:
 - Return all case-related documents to the Coordinator.
 - Return the CASA identification badge.
 - Complete an Exit Survey.
- ICAB's social media policy can be found at the end of the manual. Advocates will adhere to the policy expectations.

ACTIVITY: Find the Initial Letter of Acknowledgement by CASA Advocate-end of P&P.

- Ask all Advocates to:
 - accept or decline the responsibility of transporting children,
 - allow or not allow the program to post photos of the Advocate,
 - and acknowledge the Social Media Policy.
 - Ask that they sign and date the bottom and hand it to the Facilitator.
 - 2 pages need to be signed.
- Provide Handout 8 Iowa Code so they can read it before taking their oath during their swearing in. Remind Advocates that when they are sworn in, they will sign this Oath saying they have received the confidentiality code provided to them.

CASA Program: Advocate Policy and Procedures

CASA Case Assignment	<p>Section 4 addresses the Advocate Roles and Responsibilities and Case Record Management. Areas of significance include:</p> <ol style="list-style-type: none">1. Working with a CASA Coach or Coordinator2. Meeting with the child in-person at least once every 30 days3. Gathering information, attending meetings and being present for court hearings; continued monitoring4. Writing reports for every court hearing5. Completing reporting/tracking requirements6. Appropriate handling and storage of confidential case file documents; returning materials when a case closes.
CASA Management	<p>Section 5 covers the expectations of the Advocate during his/her involvement with the CASA Program.</p> <ol style="list-style-type: none">1. Ongoing training is 12 hours per calendar year2. Completion of a Monthly Advocate Report3. Access to portions of the office file for the Advocate4. Release of CASA from a case appointment5. Complaints and Grievances6. Completing case progress reviews at 6 months and annually thereafter7. Grounds for Dismissal from the CASA Program8. Leave of absences and resignation policies
Social Media Policy	<p>The ICAB Social Media Policy outlines specific information regarding the use of social networking. Confidentiality and secure use of social media sites is provided in the policy.</p>
Letter of Acknowledgement	<p>Participants must sign the Letter of Acknowledgement located on the final page of the P&P Manual.</p> <p>Participants should discuss any additional policy or procedure questions with his/her local Coordinator.</p>

Facilitator Notes**Module 6: Security Awareness Training**

Equipment/Supplies:

- Handout #9: *Security Awareness Training*

What you should know:

- This handout replaces the online *Securing the Human* training for all ICAB volunteers.
- This handout will be updated annually to reflect the new STH training material provided to ICAB from the State of Iowa.

What to do/say:

- Tell participants that the Iowa Child Advocacy Board's CASA and FCRB programs handle a great deal of confidential information and its volunteers are given access to that information, electronically or in hard copy. It is critical that all volunteers understand the responsibility that comes with having access to confidential information and the significance of protecting that information at all times.
- Review the red box material on page 11 of the handout in its entirety.

As a volunteer with the Iowa Child Advocacy Board:

- Familiarize yourself with the program's confidentiality and social media policies.
- Always understand the sensitivity of the information you are working with. If you are uncertain about the sensitivity of any information or the steps you should take to secure it, ask your local coordinator.
- Only use systems authorized by ICAB to store, process or transmit sensitive information. Do not copy or store sensitive information to any unauthorized systems or accounts, such as personal laptops or personal email accounts.
- Only log into ICAB's online data system with your unique user ID.
- All case file information, digital or hard copy, must be securely stored when in the volunteer's possession.
- If you believe any sensitive data has been lost, stolen or compromised be sure to contact your local coordinator immediately.

- Direct participants to read through the *Security Awareness Training* **HANDOUT #9** in its entirety to extend their knowledge and understanding of the topics covered in the handout. Advocates will receive an annual in-service training on this topic as required by the State of Iowa.

Review Handout: Security Awareness Training

Purpose

The Iowa Child Advocacy Board's CASA and FCRB programs handle a great deal of confidential information and its volunteers are given access to that information, electronically or in hard copy. It is critical that all volunteers understand the responsibility that comes with having access to confidential information and the significance of protecting that information at all times. Your understanding and following of our data security policies is key to securing our sensitive information and our organization.

Key Elements to understand

- Data protection
- Email use
- Internet use
- Social Engineering
- Data retention
- Data disposal
- Incident reporting
- Wi-Fi
- Working remotely
- Mobile device and removable media security
- Encryption
- Passwords
- Physical security
- Social networks
- Protecting your personal computer
- Personally identifiable information (PII)
- Cloud computing

FACILITATOR NOTES**Module 6: Advocate Support**

Equipment/Supplies

- Handout # 10 *EMDS for CASA Volunteers - Instructions*
 - Slide: *Motivational Analysis*
-

What you need to know

- The “Advocate Support” section takes 25 minutes. It will take longer if you help them set up their account during training.
-

What to say/do

- Advocates will need to establish their account with EDMS to have the ability to access their future cases on the EDMS system. Provide participants with **HANDOUT # 10 EMDS for CASA Volunteers - Instructions**. If you are working in an environment with internet access and a device that is internet compatible, the advocate can set up their account before leaving the training. Please note, advocates are asked to use an email address that only they have access to; not a shared account. If necessary, advocates can set up a free gmail account. Advocates should follow the handout to set up their account. At the end of the process they will supply their username and MSTR pin number to their coordinator.
- State that one additional way we support Advocates is by understanding what brings them to volunteer for the program.
- **CUE SLIDE:** *Motivational Analysis*
- The purpose of this exercise is to determine the preferred style of each Advocate, acknowledging that people with different styles prefer different kinds of supervision, recognition and job placement.

ACTIVITY:

- Ask Advocates to locate the **Motivational Analysis on page 23** in their manuals.
- Under each number, they should place an “X” beside either A, B, or C, depending on which response most closely fits their own motivation.
- Remember there are no right or wrong answers.

Motivational Analysis

Choose the response in each question which most closely fits your own motivations.

1. _____ a. When doing a job, I seek feedback.
 _____ b. I prefer to work alone and am eager to be my own boss.
 _____ c. I seem to be uncomfortable when forced to work alone.
2. _____ a. I go out of my way to make friends with new people.
 _____ b. I enjoy a good argument.
 _____ c. After starting a task, I am not comfortable until it is completed.
3. _____ a. Status symbols are important to me.
 _____ b. I am always getting involved in group projects.
 _____ c. I work better when there is a deadline.
4. _____ a. I work best when there is some challenge involved.
 _____ b. I would rather give orders than take them.
 _____ c. I am sensitive to others – especially when they are mad.
5. _____ a. I am eager to be my own boss.
 _____ b. I accept responsibility eagerly.
 _____ c. I try to get personally involved with my superiors.
6. _____ a. I am uncomfortable when forced to work alone.
 _____ b. I prefer to be my own boss, even when others feel a joint effort is required.
 _____ c. When given responsibility, I set measurable standards of high performance.
7. _____ a. I am very concerned about my reputation or position.
 _____ b. I have a desire to out-perform others.
 _____ c. I am concerned with being liked and accepted.
8. _____ a. I enjoy and seek warm, friendly relationships.
 _____ b. I attempt complete involvement in a project.
 _____ c. I want my ideas to predominate.
9. _____ a. I desire unique accomplishments.
 _____ b. It concerns me when I am being separated from others.
 _____ c. I have a need and desire to influence others.
10. _____ a. I think about consoling and helping others.
 _____ b. I am verbally fluent.
 _____ c. I am restless and innovative.
11. _____ a. I set goals and think about how to attain them.
 _____ b. I think about ways to change people.
 _____ c. I think a lot about my feelings and the feelings of others.

FACILITATOR NOTES**Module 6: Advocate Support**

Equipment/Supplies

- Handout #11: *Motivational Analysis*
-

What to say/do**Activity** (continued):

- Provide **HANDOUT #11: Motivational Analysis**
- Using the document they just completed, circle the corresponding response (of a, b, or c) under each number.
- Count and record their number of Achievement, Power/Influence, and Affiliation responses.
- Ask if any Advocates are willing to share where they scored highest.

Motivational Analysis

1.
 - a. Achievement
 - b. Power
 - c. Affiliation
2.
 - a. Affiliation
 - b. Power
 - c. Achievement
3.
 - a. Power
 - b. Affiliation
 - c. Achievement
4.
 - a. Achievement
 - b. Power
 - c. Affiliation
5.
 - a. Power
 - b. Achievement
 - c. Affiliation
6.
 - a. Affiliation
 - b. Power
 - c. Achievement
7.
 - a. Power
 - b. Achievement
 - c. Affiliation
8.
 - a. Affiliation
 - b. Achievement
 - c. Power
9.
 - a. Achievement
 - b. Affiliation
 - c. Power
10.
 - a. Affiliation
 - b. Power
 - c. Achievement
11.
 - a. Achievement
 - b. Power
 - c. Affiliation

ACHIEVEMENT

POWER/INFLUENCE

AFFILIATION

FACILITATOR NOTES**Module 6: Advocate Support**

Equipment/Supplies

What to say/do**Activity** (continued):

- State that although most individuals have a mix of all three types, one style tends to be predominant for each individual, and we generally try to satisfy the need that is strongest in any given situation.
- For the need of Achievement, these individuals may:
 - Desire excellence
 - Calculated risk takers
 - Need a sense of accomplishment
 - Task-oriented
 - Like to problem solve
 - Desire feedback
- For the need of Power/Influence, these individuals may:
 - Like to lead
 - Decision-makers
 - Enjoy giving advice
 - Charismatic
 - Create confidence in others
 - Concern for position and respect
- For the need of Affiliation, these individuals may:
 - Sensitive to the needs & wants of others
 - Like to be well thought of
 - Enjoy and want interaction
 - Talk about feelings
 - Dislike being alone in work or play
 - Like frequent praise
- Once we understand our personal motivational style related to work or volunteerism and what is important to each of us, then our Coordinators/Coaches can make every effort to increase Advocate's satisfaction and longevity within their role.
- Please turn in **Handout 11: *Motivational Analysis*** so it can be shared with Coordinators/Coaches.

Understanding Motivational Analysis

In 1968, Harvard professors, McClelland & Atkinson, identified **three primary needs** that we attempt to fulfill *through work*: The **Need for Achievement**; the **Need for Power or Influence**; and the **Need for Affiliation**.

Although most individuals have a mix of all three types, one need tends to be predominant for each individual, and we generally try to satisfy the need that is strongest in any given situation. For example, I may volunteer for an organization because I believe passionately in the cause and I have a need to feel a sense of belonging and affiliation with others who share that belief. The need I am hoping to satisfy in this situation may be very different from the need I feel when working on a political campaign or serving on a fundraising committee. In those situations, I may have a stronger need to make something happen or to bring about change.

FOR ACHIEVEMENT

Desire for excellence
Want to do a good job
Need a sense of accomplishment
Want to Advance
Desire Feedback

Calculated risk takers
Restless
Task-oriented
Like challenging work
Like to problem solve

THE NEED FOR POWER/INFLUENCE

Like to lead
Enjoy giving advice
Like influencing an important project
Concern for position and respect
Like to have their ideas carried out

Decision-makers
Charismatic
Create confidence in others
Verbally fluent and forceful
View themselves as capable

THE NEED FOR AFFILIATION

Like to be popular
Like to be well thought of
Enjoy and want interaction
Dislike being alone in work or play
Like to help others

Sensitive to others needs/wants
Support others to achieve goals
Talk about feelings
Desire harmony
Like frequent praise

Once we understand our personal motivational style related to work or volunteerism, and what is important to each of us, then we can make every effort to increase volunteer satisfaction and longevity within the Advocate's role.

FACILITATOR NOTES**Module 6: Advocate Support**

Equipment/Supplies

- Slide: *Remember My Story: ReMoved Part 2*
 - Slide: *Pre-Service Training Summary*
-

What to say/do

- Now that we've finished the nuts and bolts of becoming a CASA Advocate, let's remind ourselves of why we are here. Share that we will watch the final part of the removed video to learn the rest of her story.
- **CUE SLIDE.** View **Video** *Remember My Story: ReMoved Part 2* to summarize the concepts. (22 mins)
- **Debrief** *Removed* video: Make sure Advocates can identify the positive conclusion that children from abuse/neglect, with high ACEs scores, can be resilient and go on to be healthy adults.
- **CUE SLIDE:** *Pre-Service Training Summary*
- As we approach the end of our pre-service training, let's quickly recap all you've learned:
 - Module 1 – Introduction to CASA
 - Module 2 – Child Advocacy Fundamentals (law, juvenile court)
 - Module 3 – Child Advocacy Concepts (cultural competency, issues affecting children/families)
 - Module 4 – Practicing CASA role: Children and Communication
 - Module 5 – Practicing CASA role: Diversity in Families
 - Module 6 – Putting It Together (report writing, court appearance)

Conclusion to video:
Remember my Story: Removed Part 2

Pre-Service Training Summary

Module 1 Personal Study (1 hour): Introduction

When we began, you learned what CASA is and how you fit into this advocacy role. You were introduced to the Myers family, who represent a similar case you may serve in the future.

Module 2 In-Person (4 hours): Child Advocacy Fundamentals

This session focused on the principles, concepts and responsibilities you need to know in order to advocate for the safety, well-being and permanency of children; pertinent child welfare laws; who the key parties are in a juvenile court case; how a child's case moves through the juvenile court process; and how to navigate the case file documents to gather information.

Module 3 Personal Study (4 hours): Exploring Concepts in Child Advocacy

Your study time was spent learning about what it means to be culturally competent; why this is so important for an Advocate to know; and understanding the factors affecting families and children, including the key stressors of poverty, substance abuse, mental illness, and domestic violence. You were challenged to consider what influences your own thinking and behavior.

Module 4 In-Person (First day of 2-day training): Practicing the CASA Role – Children and Communication

This session focused on the first steps to understanding a case. We discussed children's needs and the factors that influence development. We practiced the communication skills needed to successfully advocate for children.

Module 5 In-Person (Second day of 2-day training): Practicing the CASA Role – Diversity in Families

This module included activities that reinforced our understanding of topics such as valuing differences; using a strength-based lens; and the major factors that impact the lives of families. Additionally, we practiced gathering information as an Advocate.

Module 6 In-Person (6 hours): Putting it All Together

Finally, we concluded with many of the specific tasks an Advocate completes, such as: writing an effective court report; appearing in court; monitoring a case; and accessing electronic records. We practiced outlining a court report as preparation for one of your major tasks as an Advocate.

FACILITATOR NOTES**Module 6: Advocate Support**

Equipment/Supplies

- Handout 12: *Coach Communication Chain of Command*
 - Redistribute their HANDOUT: *Advocate Skills and Perspective Pre-Post-Assessment that was provided at end of Interview and discussed in Module 2.*
-

What you should know

- If needed, remind Advocates that ongoing skill development will be provided on an as-needed basis.
 - You need to collect these assessments to keep in their file and scan to put on appropriate Dropbox Training folder>CASA Pre-Service Training>Completed Advocate Assessments.
-

What to say/do

- Share the ways the program supports the Advocate: What they can expect from staff moving forward:
 - Ongoing skill and case specific in-service training
 - Monthly contact through Monthly Updates and ongoing case feedback via email, phone, and in person contact.
 - Performance evaluations of us and the Advocate to provide formal feedback
 - If assigned to a Coach, they will also provide regular support of your advocacy efforts.
 - Cover information on *CASA COACH Communication Chain of Command HANDOUT #12.*
- As we approach the end of our pre-service training, we would like to know how you would now rate yourself on the important characteristics of a CASA Advocate.

ACTIVITY:

- Disperse **HANDOUT:** *Advocate Skills and Perspective Pre- Post-Assessment.*
- Please take 5 minutes and complete the post-assessment.
- Upon completion, ask Advocates if they scored differently from the pre-assessment. If so, in what areas?
- Debrief that at the beginning of their training they may have felt one way about their skills based on what they knew at that time, and after training self-assess to a similar level for a final outcome.
- Ask Advocates to turn in the assessment in order to share these strengths and training needs with their Coordinator.

The Advocate

This is not about the comfort of compassion.

This is not about rescue, so as to feel good when the child lights up with a smile.

This is hard work, struggling with ripped families and children in clouds of pain, anger dancing around in their hearts in the turmoil of a world made crazy.

This is caring, yes, but also what is just, what should be demanded.

It takes love and a certain measure of courage.

And in the simple act of person helping person, it becomes extraordinary.

*Mercedes Lawry
Former Communications Director, National CASA*



FACILITATOR NOTES**Module 6: Summary/Evaluation**

Equipment/Supplies

- Slide: *Next Steps*
 - Slide: *Learning Outcomes*
 - Slide: *You Made It*
-

What to say/do

- **CUE SLIDE:** *Next Steps*. Advise Advocates that they will be contacted by their Coordinator to schedule a time to observe a juvenile court hearing and be officially sworn-in by the local judge.
- **CUE SLIDE:** *Learning Objectives*
- Before completing the evaluation for Module 6, remind Advocates of the learning objectives for this module.
- Share that now that their formal pre-service training is almost complete, we want them to feel confident that we will provide ongoing training that meets their individual learning needs and skill development based on the case they are assigned.
- We will complete an Individual Training Needs Assessment and use that information to guide in our delivery of the annual 12 hours of in-service training that National CASA outlines as the standard. Some of these include topics include Gathering Information, a more in-depth look at the types of information to consider gathering after case assignment and the Report Writing Training prior to your first court report being written.
- Ask Advocates to complete the training **Evaluation** for this last module of pre-service training on **pg 28** of their manuals and leave them in the room.
- **CUE SLIDE:** You Made It
- Our manual concludes with “The Advocate” poem.
- Thank Advocates for all their time, effort, and dedication through our pre-service training.
- Collect the Module 6 Evaluation and the Myers Case Study if they did not write in it or do not want to keep it.

Evaluation Module 6

Please complete this evaluation of the sixth pre-service training module. Did you learn what was intended? (6 is high and 1 is low)

Learning Outcomes	Ratings					
	6	5	4	3	2	1
1. Identify the characteristics of an effective court report						
2. Demonstrate how to appear in court						
3. List the steps for monitoring a case						
4. The content of this session was						
5. The notebook materials were						
6. The activities were						
7. The facilitator was						
8. Overall, I rate this session						

9. What was the most valuable to you?

10. Is there anything we could improve or do differently?

Name _____ Date _____

Thank you for your participation and feedback!